

How to Change the Category and the Account Code



Users are frequently asked to change the account code on a requisition before it is approved and sourced to a purchase order. Please understand that if the account code is changed, the category must be changed to correspond to the new account code. If the category is not changed, the tolerances and receiving requirements might be inappropriate for the purchase.

Categories and account codes share the same values. This job aid explains how to change the category and account code on a saved requisition.

Step 1.

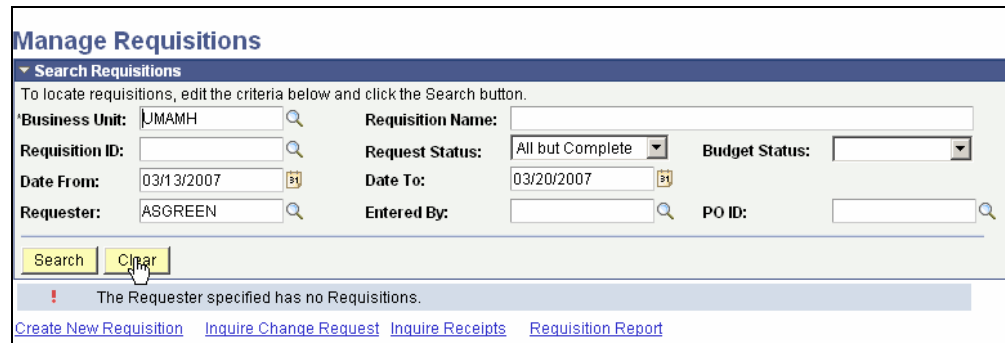
Log into the e*mpac Finance Application with your FIN Username and Password.



Navigate to the following path:

eProcurement → Manage Requisitions

The **Manage Requisitions** page opens.



Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	JMAMH	Requisition Name:	
Requisition ID:		Request Status:	All but Complete
Date From:	03/13/2007	Date To:	03/20/2007
Requester:	ASGREEN	Entered By:	
		PO ID:	

Search Clear

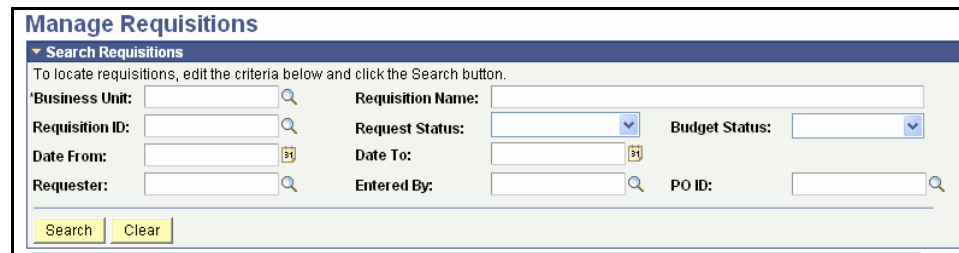
! The Requester specified has no Requisitions.

[Create New Requisition](#) [Inquire Change Request](#) [Inquire Receipts](#) [Requisition Report](#)

Step 2.

Click the **Clear** button.

The **Search Criteria** is cleared:



Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:		Requisition Name:	
Requisition ID:		Request Status:	
Date From:		Date To:	
Requester:		Entered By:	
		PO ID:	

Search Clear

- Step 3. **Business Unit:** Enter UMAMH
- Step 4. **Enter** the appropriate **Requisition ID** (10 digits) that you wish to modify
- Step 5. Click the Search button.

The **Requisitions** section appears with the requested requisition. In this example, the requisition status is **Denied**. The requisition has been denied by central staff. An email notification has been sent to the Requester listed on the requisition. A Denied requisition will remain in a status of denied until it is resubmitted to workflow.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	<input type="text" value="UMAMH"/>	Requisition Name:	<input type="text"/>
Requisition ID:	<input type="text" value="R000004503"/>	Request Status:	<input type="text"/>
Date From:	<input type="text"/>	Date To:	<input type="text"/>
Requester:	<input type="text"/>	Entered By:	<input type="text"/>
		PO ID:	<input type="text"/>

Search
Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▶

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	Action
▶ R000004503	HSG/CLAUDIO,CZABAJ	UMAMH	03/15/2007	Denied	Valid	3,300.00USD	<Select Action...> Go



A requisition can be modified at any time until it is sourced to a purchase order. Once it's been sourced to a purchase order, the status will change to **POs Created** or **POs Dispatched**.

Step 6. Click on the drop down arrow next to **Select Action** and **select View Approvals**:

Step 7.

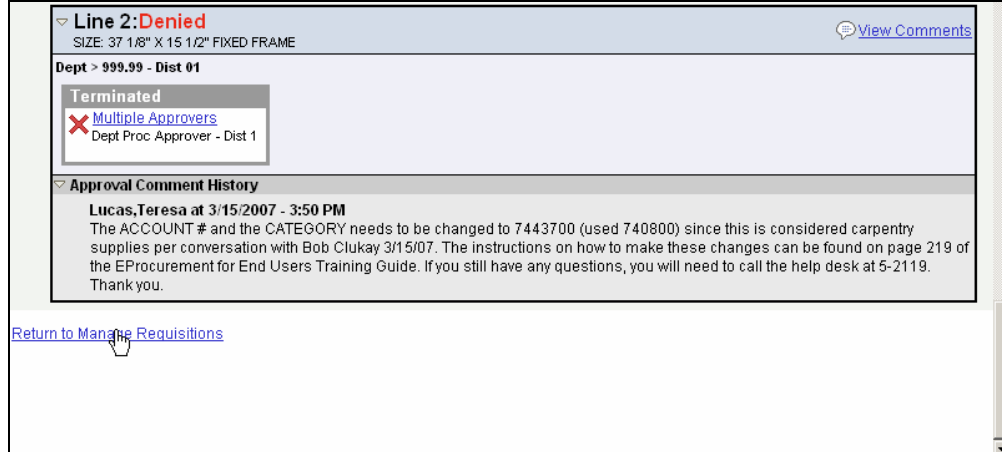


Click the **Go** button to view the reason for the denial.

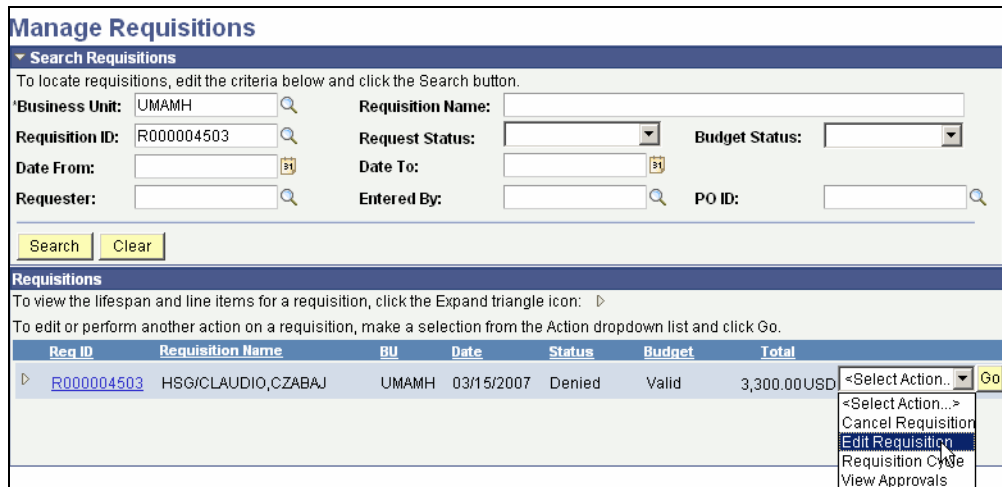
Step 8.

The **Approval Status** page opens. **Review** the Comment in the **Approval Comment History** section. The Requester has been requested by central staff to change the category and the account code on both lines of this two-line requisition. An explanation has been provided.

Step 9. Scroll to the bottom of the page and **Click the Return to Manage Requisitions** hyperlink:



Step 10. The **Manage Requisitions** page re-appears. **Click** on the drop-down arrow next to **Select Action** and **select Edit Requisition**:



Step 11. Click the  **Go** button

Step 12. The **Edit Requisition** page opens to the **Review and Submit** tab. The category and account code need to be changed on both lines.

Click the [Select All/Deselect All](#) hyperlink to select both lines.

Edit Requisition

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UMass Amherst

Requester: Isles, Carrie 'Currency:

Requisition Name: Hold From Further Processing Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/1 6" W/ CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2"	GREENFIELD GLASS CO INC	75.0000	Each	33.000	2,475.00
2	SIZE: 37 1/8" X 15 1/2" FIXED FRAME	GREENFIELD GLASS CO INC	25.0000	Each	33.000	825.00
Total Amount:						3,300.00 USD

[Select All / Deselect All](#)

Step 13. Click the button

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/1 6" W/ CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2"	GREENFIELD GLASS CO INC	75.0000	Each	33.000	2,475.00
2	SIZE: 37 1/8" X 15 1/2" FIXED FRAME	GREENFIELD GLASS CO INC	25.0000	Each	33.000	825.00
Total Amount:						3,300.00 USD

[Select All / Deselect All](#)

Step 14. The **Modify Line/Shipping/Accounting** page opens.

Enter the new category and account code in the **Category** and **Account** fields and



Click the button:

Step 15.

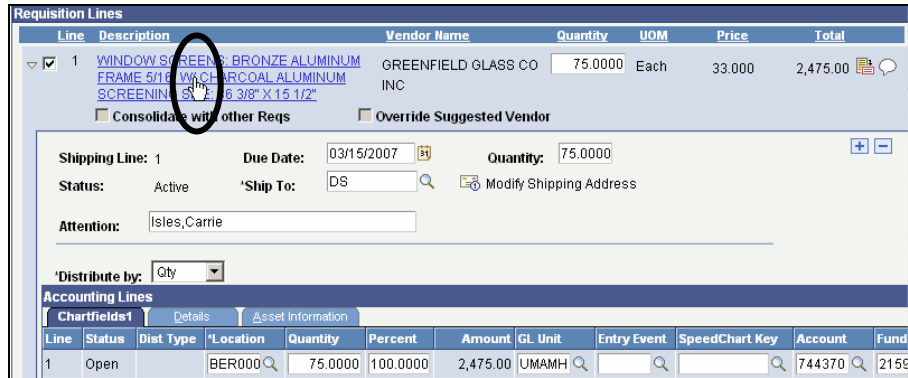
The **Edit Requisition** page re-appears. Click the **Expand Section** icon next to Line 1 to view the distribution line and the revised account code:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" VW CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2"	GREENFIELD GLASS CO INC	75.0000	Each	33.000	2,475.00
2	SIZE: 37 1/8" X 15 1/2" FIXED FRAME	GREENFIELD GLASS CO INC	25.0000	Each	33.000	825.00
Total Amount:						3,300.00 USD

Step 16. **View** the Account Code to insure it has transferred appropriately:

Line	Status	Dist Type	Location	Quantity	Percent	Amount	GL Unit	Entry Event	SpeedChart Key	Account	Fund
1	Open		BER000	75.0000	100.0000	2,475.00	UMAMH			744370	2159

Step 17. Click on the **Description** hyperlink for Line 1 to view the category change:

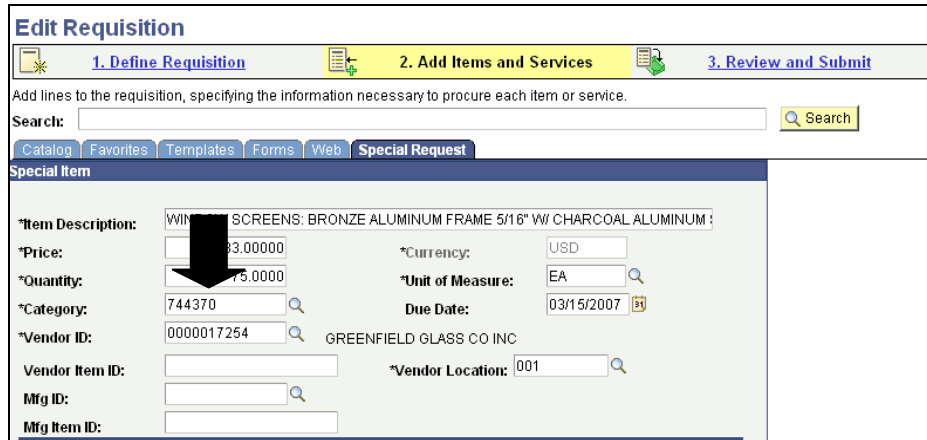


Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM SCREENING SCREENS 3/8" X 15 1/2"	GREENFIELD GLASS CO INC	75.0000	Each	33.0000	2,475.00

Shipping Line: 1 Due Date: 03/15/2007 Quantity: 75.0000
 Status: Active Ship To: DS Modify Shipping Address
 Attention: Isles, Carrie
 Distribute by: Qty

Line	Status	Dist Type	Location	Quantity	Percent	Amount	GL Unit	Entry Event	SpeedChart Key	Account	Fund
1	Open		BER000	75.0000	100.0000	2,475.00	UMAMH			744370	215E

Step 18. The **Special Request/Special Item** page opens. **View** the Category to insure that it has transferred appropriately.



Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

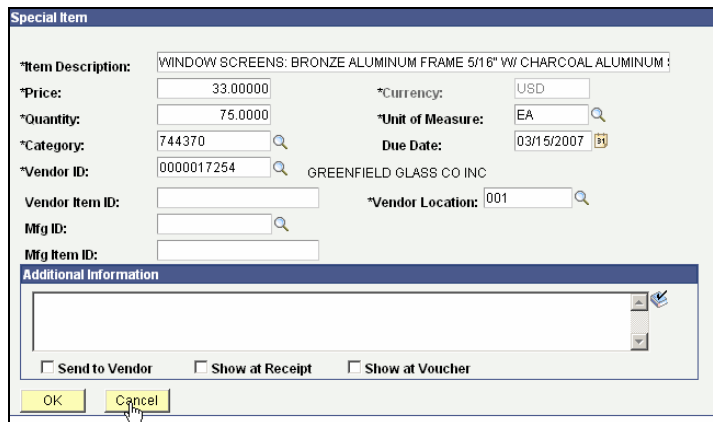
Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description: WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM
 *Price: 33.00000 *Currency: USD
 *Quantity: 75.0000 *Unit of Measure: EA
 *Category: 744370 Due Date: 03/15/2007
 *Vendor ID: 0000017254 GREENFIELD GLASS CO INC
 Vendor Item ID: *Vendor Location: 001
 Mfg ID: Mfg Item ID:

Step 19. Scroll to the bottom of the page and click the **Cancel** button to return to the **Edit Requisition** page:



Special Item

*Item Description: WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM
 *Price: 33.00000 *Currency: USD
 *Quantity: 75.0000 *Unit of Measure: EA
 *Category: 744370 Due Date: 03/15/2007
 *Vendor ID: 0000017254 GREENFIELD GLASS CO INC
 Vendor Item ID: *Vendor Location: 001
 Mfg ID: Mfg Item ID:

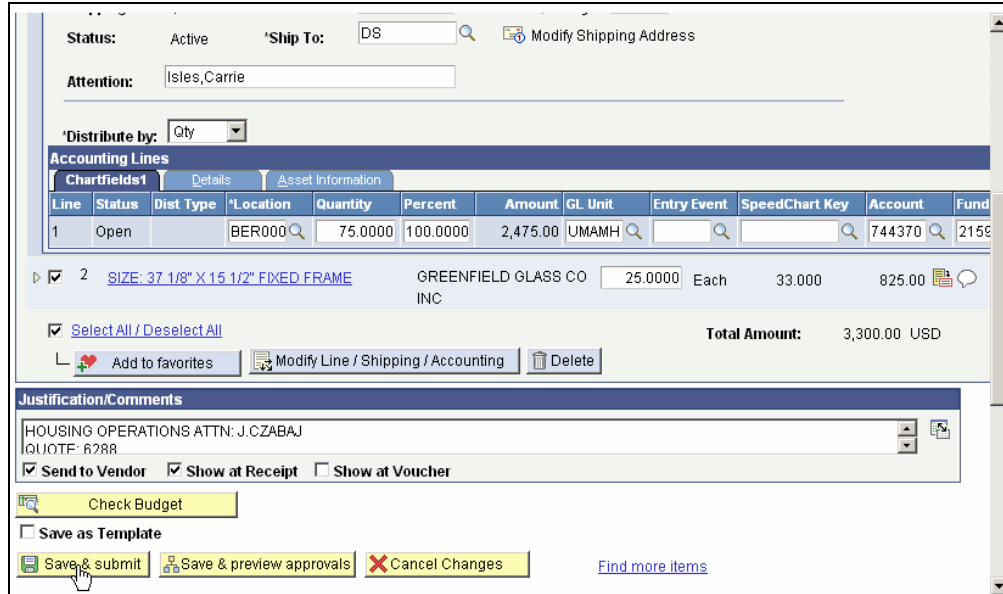
Additional information

Send to Vendor Show at Receipt Show at Voucher

Step 20.



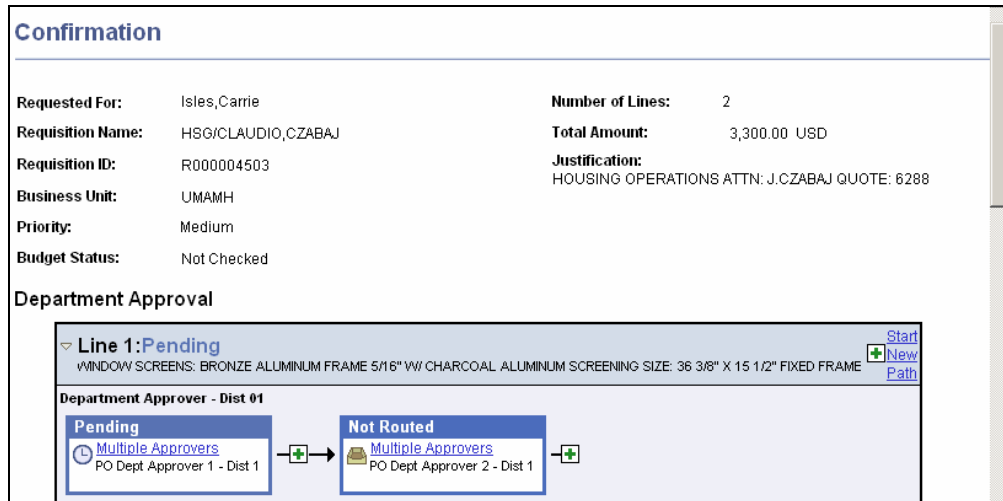
Scroll to the bottom of the **Edit Requisition** page and **Click** the button to save the changes and re-submit the requisition to workflow:



The screenshot shows the 'Edit Requisition' page. At the bottom, the 'Save & submit' button is highlighted with a mouse cursor. Other visible elements include the 'Status' (Active), 'Ship To' (DS), 'Attention' (Isles, Carrie), 'Distribute by' (Qty), 'Accounting Lines' table, and 'Justification/Comments' section.

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Entry Event	SpeedChart Key	Account	Fund
1	Open		BER000	75.0000	100.0000	2,475.00	UMAMH			744370	2159
2			SIZE: 37 1/8" X 15 1/2" FIXED FRAME				GREENFIELD GLASS CO	25.0000	Each	33.000	825.00
										Total Amount:	3,300.00 USD

The **Confirmation** page opens. The requisition has moved to the worklist of the department approver. The **Budget Status** is Not Checked.



The screenshot shows the 'Confirmation' page. It displays requisition details and a department approval workflow diagram.

Requested For: Isles, Carrie
Requisition Name: HSG/CLAUDIO,CZABAJ
Requisition ID: R000004503
Business Unit: UMAMH
Priority: Medium
Budget Status: Not Checked

Number of Lines: 2
Total Amount: 3,300.00 USD
Justification: HOUSING OPERATIONS ATTN: J.CZABAJ QUOTE: 6288

Department Approval

Line 1: Pending
 WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2" FIXED FRAME

Department Approver - Dist 01

```

  Pending
  Multiple Approvers
  PO Dept. Approver 1 - Dist 1
  →
  Not Routed
  Multiple Approvers
  PO Dept. Approver 2 - Dist 1
  
```

Step 21.

Scroll to the bottom of the page and **Click** the  Button to budget check the revised requisition:

Procurement or State Approval

▼ **Line 1: Awaiting Further Approvals** [Start New Path](#)

WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2" FIXED FRAME

Dept > 999.99 - Dist 01

Not Routed

[Multiple Approvers](#)

Dept Proc Approver - Dist 1

▼ **Line 2: Awaiting Further Approvals** [Start New Path](#)

SIZE: 37 1/8" X 15 1/2" FIXED FRAME

Dept > 999.99 - Dist 01

Not Routed

[Multiple Approvers](#)

Dept Proc Approver - Dist 1

Submit **Edit Requisition** Apply Approval Changes **Check Budget**

[View Printable Version](#) [Manage Requisitions](#) [Create New Requisition](#)

Step 22.

When **Processing** has completed, **Scroll** to the top of the page to view the budget status. The budget status should show as **Valid**:

Confirmation

Requested For:	Isles, Carrie	Number of Lines:	2
Requisition Name:	HSG/CLAUDIO,CZABAJ	Total Amount:	3,300.00 USD
Requisition ID:	R000004503		
Business Unit:	UMAMH		
Priority:	Medium		
Budget Status:	Valid		

Step 23. Scroll back to the bottom of the page and click the [Manage Requisitions](#) hyperlink to return to the Manage Requisitions page:

Procurement or State Approval

Line 1: Awaiting Further Approvals Star New Pat	
WINDOW SCREENS: BRONZE ALUMINUM FRAME 5/16" W/ CHARCOAL ALUMINUM SCREENING SIZE: 36 3/8" X 15 1/2" FIXED FRAME	
Dept > 999.99 - Dist 01	
Not Routed	
+	Multiple Approvers Dept Proc Approver - Dist 1 - +

Line 2: Awaiting Further Approvals + Start New Pat	
SIZE: 37 1/8" X 15 1/2" FIXED FRAME	
Dept > 999.99 - Dist 01	
Not Routed	
+	Multiple Approvers Dept Proc Approver - Dist 1 - +

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End Job Aid



Last Edited Date	3/20/2007
Last Edited By	Sue Green